Estate Planning Worksheet



LeonardLaw, LLC

Estate Planning. Custom Made. Like Your Life.

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ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL. Using this organizer will help us design an estate plan that fully addresses your goals.

PLEASE RETURN THE COMPLETED WORKSHEET VIA EMAIL PRIOR TO YOUR APPOINTMENT. YOU CAN TYPE YOUR ANSWERS DIRECTLY IN THIS FORM.

**PERSONAL INFORMATION**

**Husband’s Legal Name**

(name most often used to title property and accounts)

Also Known As

(other names used to title property and accounts)

In your will or trust would you like to use your middle name, middle initial or neither?

Prefer to be called Birth date US Citizen? \_\_\_\_

Home Address City State Zip

Home Telephone County of Residence Cell

Employer Position

E-mail Address ❑ It is okay to communicate with me via my E-mail address.

**Wife’s Legal Name**

(name most often used to title property and accounts)

Also Known As

(other names used to title property and accounts)

In your will or trust would you like to use your middle name, middle initial or neither?

Prefer to be called Birth date US Citizen? \_\_

Home Address City State Zip

Home Telephone County of Residence Cell

Employer Position

E-mail Address ❑ It is okay to communicate with me via my E-mail address.

Date of Marriage

Referral Source (e.g. “Friend” – please give their name so we can thank them – or “website”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Children and Other Family Members

*(Use full legal name. Use “JT” if both spouses are the parents, “H” if husband is the parent, “W” if wife is the parent, “S” if a single parent.)*

**Name Male/Female Birth date Parent or Relationship**

**PEOPLE (FIDUCIARIES) TO ACT FOR YOU**

**\* *Address and phone numbers for the same individual does not need to be provided more than once***

**GUARDIAN FOR MINOR CHILDREN under 18, if applicable:**

**Name, Address, Phone Relationship**

Initial:

Successor:

Successor:

**PERSONAL REPRESENTATIVE OF YOUR WILL**

**The person who will follow the instructions set out in your will and will handle the probate of the will.**

HUSBAND’S AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

WIFE’s AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

**FINANCIAL POWER OF ATTORNEY**

**If you were unable to make financial decisions for yourself, who would you want to make those decisions for you?**

HUSBAND’S AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

WIFE’S AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

**HEALTHCARE POWER OF ATTORNEY**

**If you were unable to make decisions for yourself, who would you wish to make decisions for you with regard to your medical treatment?**

HUSBAND’S AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

WIFE’S AGENT

**Name, Address, Phone Relationship**

Initial:

Successor/Alternate:

Successor/Alternate:

**HIPAA AGENT**

**Which family members or friends would you like to have access to your protected healthcare information? These individuals will be simultaneously authorized to have access to information. However, they cannot make decisions, unless they are also the individual serving as your healthcare power of attorney at the time.**

HUSBAND’S AGENT

**Name, Address, Phone Relationship**

WIFE’S AGENT

**Name, Address, Phone Relationship**

**SUCCESSOR TRUSTEE IF HUSBAND IS THE SECOND TO DIE (if applicable)**

**You (and your spouse) will typically be the initial Trustees.**

**Name Relationship**

Initial:

Successor:

Successor:

**SUCCESSOR TRUSTEE IF WIFE IS THE SECOND TO DIE (if applicable)**

**You (and your spouse) will typically be the initial Trustees.**

**Name Relationship**

Initial:

Successor:

Successor:

**SPECIFIC GIFTS**

**SPECIFIC GIFTS:** List any specific gifts of real estate or cash gifts you wish to make to either individuals or charities. Indicate whether these gifts are to be made even if the other spouse is alive.

**FOR HUSBAND:**

**Individual or Charity Amount or Property Contingent on Wife predeceasing?**

**FOR WIFE:**

**Individual or Charity Amount or Property Contingent on Husband predeceasing?**

YOUR CONCERNS

Please rate the following as to how important they are to you:

*(****H*** *high concern,* ***S*** *some concerned,* ***L*** *low concern,* ***N/A*** *no concern or not applicable)*

|  |  |  |
| --- | --- | --- |
| **Description** | **Level of Concern** | |
|  | **Husband** | **Wife** |
| Desire to get affairs in order and create a comprehensive plan to manage affairs in case of death or disability. |  |  |
| Providing for and protecting a spouse. |  |  |
| Providing for and protecting children. |  |  |
| Providing for and protecting grandchildren. |  |  |
| Disinheriting a family member, including an in-law (including daughter or son-in-law). |  |  |
| Providing for charities at the time of death. |  |  |
| Plan for the transfer and survival of a family business. |  |  |
| Avoiding or reducing your estate taxes. |  |  |
| Avoiding probate. |  |  |
| Reduce administration costs at time of your death. |  |  |
| Authorizing an agent to make medical and financial decisions in the event of a disability. |  |  |
| Avoiding will contests or other disputes upon death. |  |  |
| Protecting assets from lawsuits or creditors. |  |  |
| Preserving the privacy of affairs in case of disability or at time of death from business competitors, predators, dishonest persons and curiosity seekers. |  |  |
| Plan for a child with disabilities or special needs, such as medical or learning disabilities. |  |  |
| Protecting children’s inheritance from the possibility of failed marriages. |  |  |
| Protect children’s inheritance in the event of a surviving spouse’s remarriage. |  |  |
| Provide that your death shall not be unnecessarily prolonged by artificial means or measures. |  |  |
| Plan for Long Term Care in the event of a disability. |  |  |

Other Concerns (Please list below):

Family Questions

|  |  |  |
| --- | --- | --- |
| **(Please check “Yes” or “No” for your answer)** | **Yes** | **No** |
| Are you (or your spouse) receiving Social Security, disability, or other governmental benefits? *Describe* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
| Are you (or your spouse) making payments pursuant to a divorce or property settlement order? *Please furnish a copy* |  |  |
| If married, have you and your spouse signed a pre- or post-marriage contract? *Please furnish a copy* |  |  |
| Have you (or your spouse) been widowed? *If a federal estate tax return or a state death tax return was filed, please furnish a copy* |  |  |
| Have you (or your spouse) ever filed federal or state gift tax returns?  *Please furnish copies of these returns* |  |  |
| Have you (or your spouse) completed previous will, trust, or estate planning? *Please furnish copies of these documents* |  |  |
| Are you concerned with disability planning? Has anyone close to you suffered from Alzheimer’s or dementia? |  |  |
| Are there charitable organizations you wish to make provisions for at the time of your death? *If so, please explain below*. |  |  |
| If married, have you lived in any of the following states while married to each other? *Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin* |  |  |
| Are you (or your spouse) currently the beneficiary of anyone else’s trust? *If so, please explain below.* |  |  |
| Do any of your children have special educational, medical, or physical needs? |  |  |
| Do any of your children receive governmental support or benefits? |  |  |
| Do you provide primary or other major financial support to adult children or others? |  |  |

SUMMARY OF VALUES

Provide ROUGH estimates

**Amount\***

**Assets Husband Wife Total Value**

Real Property First Home

Real Property Second Home

Furniture and Personal Effects

Automobiles, Boats and RV’s

Bank and Savings Accounts

Stocks and Bonds `

Life Insurance and Annuities

Retirement Plans

Business Interests

Money owed to you

Anticipated Inheritance, Etc.

Digital Assets, Domains, Licenses, Videos, Art, etc.

Cypto Currencies \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_

Other Assets \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_

**Total Assets:**

*\** ***Joint Property values enter 1/2 in husband’s column and 1/2 in wife’s column.***

OTHER CONCERNS AND ADDITIONAL INFORMATION